

<b>Notice of Allowability</b>	<b>Application No.</b>	<b>Applicant(s)</b>	
	10/692,525	TANGEN ET AL.	
	<b>Examiner</b>	<b>Art Unit</b>	
	QUOC A. TRAN	2176	

**-- The MAILING DATE of this communication appears on the cover sheet with the correspondence address--**

All claims being allowable, PROSECUTION ON THE MERITS IS (OR REMAINS) CLOSED in this application. If not included herewith (or previously mailed), a Notice of Allowance (PTOL-85) or other appropriate communication will be mailed in due course. **THIS NOTICE OF ALLOWABILITY IS NOT A GRANT OF PATENT RIGHTS.** This application is subject to withdrawal from issue at the initiative of the Office or upon petition by the applicant. See 37 CFR 1.313 and MPEP 1308.

1. ☒ This communication is responsive to Applicant's amendments filed 03/30/10 and telephone interview 11/03/2010.
2. ☒ The allowed claim(s) is/are 1, 4, 6-17, 40, 15, 18, 41, 23, 26, 28-36, 38-39 and 42 (renumbering as 1-31 respectively).

3. ☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).

a) ☐ All    b) ☐ Some\*    c) ☐ None    of the:

1. ☐ Certified copies of the priority documents have been received.
2. ☐ Certified copies of the priority documents have been received in Application No. \_\_\_\_\_.
3. ☐ Copies of the certified copies of the priority documents have been received in this national stage application from the International Bureau (PCT Rule 17.2(a)).

\* Certified copies not received: \_\_\_\_\_.

Applicant has THREE MONTHS FROM THE "MAILING DATE" of this communication to file a reply complying with the requirements noted below. Failure to timely comply will result in ABANDONMENT of this application.

**THIS THREE-MONTH PERIOD IS NOT EXTENDABLE.**

4. ☐ A SUBSTITUTE OATH OR DECLARATION must be submitted. Note the attached EXAMINER'S AMENDMENT or NOTICE OF INFORMAL PATENT APPLICATION (PTO-152) which gives reason(s) why the oath or declaration is deficient.
5. ☐ CORRECTED DRAWINGS ( as "replacement sheets") must be submitted.
- (a) ☐ including changes required by the Notice of Draftsperson's Patent Drawing Review ( PTO-948) attached
- 1) ☐ hereto or 2) ☐ to Paper No./Mail Date \_\_\_\_\_.
- (b) ☐ including changes required by the attached Examiner's Amendment / Comment or in the Office action of Paper No./Mail Date \_\_\_\_\_.

**Identifying indicia such as the application number (see 37 CFR 1.84(c)) should be written on the drawings in the front (not the back) of each sheet. Replacement sheet(s) should be labeled as such in the header according to 37 CFR 1.121(d).**

6. ☐ DEPOSIT OF and/or INFORMATION about the deposit of BIOLOGICAL MATERIAL must be submitted. Note the attached Examiner's comment regarding REQUIREMENT FOR THE DEPOSIT OF BIOLOGICAL MATERIAL.

**Attachment(s)**

- |  |   |
|--|---|
| <p>1. <input type="checkbox"/> Notice of References Cited (PTO-892)</p> <p>2. <input type="checkbox"/> Notice of Draftsperson's Patent Drawing Review (PTO-948)</p> <p>3. <input type="checkbox"/> Information Disclosure Statements (PTO/SB/08),<br/>Paper No./Mail Date _____</p> <p>4. <input type="checkbox"/> Examiner's Comment Regarding Requirement for Deposit<br/>of Biological Material</p> | <p>5. <input type="checkbox"/> Notice of Informal Patent Application</p> <p>6. <input checked="" type="checkbox"/> Interview Summary (PTO-413),<br/>Paper No./Mail Date <u>11/03/2010</u>.</p> <p>7. <input checked="" type="checkbox"/> Examiner's Amendment/Comment</p> <p>8. <input checked="" type="checkbox"/> Examiner's Statement of Reasons for Allowance</p> <p>9. <input type="checkbox"/> Other _____.</p> |
|--|---|

/DOUG HUTTON/  
Supervisory Patent Examiner, Art Unit 2176



### **DETAILED ACTION**

In response to Applicant's amendments/remarks filed 03/30/2010 and telephone interview on 11/03/2010; the current patent application originally filed 10/27/2003. The examiner's amendment was authorized by attorney of record Preetam B. Pagar Attorney for Applicants.

- Claims 1, 4, 6-18, 23, 26, 28-36 and 38-42, are pending.
- Claims 26, 28-36, 38-39 and 42 are currently amended.
- Claims 2-3, 5, 19-22, 24-25, 27 and 37 are cancelled.

### ***EXAMINER'S AMENDMENT***

The application has been amended as follows:

1. (Previously Presented) A method for establishing a mapping between internal metadata for a database and external metadata, the method comprising:

reading the internal metadata from the database, the internal metadata including metadata that describes data stored in the database;

generating and displaying a screen, the screen including a grid having rows and columns, the rows and columns having dimensional metadata from the internal metadata placed in the grid as row and/or column headings, the grid further including the internal metadata read from the database;

receiving from a user a selection of a portion of the grid, the selection indicating the internal metadata to be mapped to the external metadata;

in response to receiving the user selection:

determining if the external metadata describing all data points within said selection is predefined, and if so, receiving from said user a definition of external metadata comprising:

presenting said user a list from which they may select an item of predefined metadata; and

receiving from said user a selection of an item of predefined metadata from said list; and

determining if a syntax of the external metadata describing all data points within said selection is predefined and the external metadata for said selection is not predefined, and if so, receiving from said user a definition of external metadata comprising:

presenting said user with one or more dialog boxes in which they can specify external metadata to be created; and

receiving from said user a specification of external metadata to be created; and

determining if neither the external metadata describing all data points within said selection is predefined nor the syntax of the external metadata describing all data points within said selection is predefined, and if so creating new internal metadata comprising:

creating a new row or column in the grid;

receiving a formula involving the user selection of a portion of the grid;

entering the formula into a cell in the new row or column; and

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repeating the steps of determining if the external metadata describing all data points within said selection is predefined and determining if a syntax of the external metadata describing all data points within said selection is predefined;  
and

creating a mapping between the internal metadata of the selected portion of the grid and the external metadata based on the user selections.

2. (Canceled)

3. (Canceled)

4. (Previously Presented) The method of claim 1, wherein said list is provided in a tree control.

5. (Canceled)

6. (Previously Presented) The method of claim 1, wherein said presenting includes presenting said user with a dialog box in which they can specify an entity for said external metadata to be created.

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7. (Previously Presented) The method of claim 1, wherein said presenting includes presenting said user with a dialog box in which they can specify units for said external metadata to be created.

8. (Previously Presented) The method of claim 1, wherein said presenting includes presenting said user with a dialog box in which they can specify a time period for said external metadata to be created.

9. (Previously Presented) The method of claim 1, wherein said presenting includes presenting said user with a dialog box in which they can specify a scenario for said external metadata to be created.

10. (Original) The method of claim 9, wherein a control for said dialog box is a tree control when an element button is selected and a text field when a custom button is selected.

11. (Original) The method of claim 1, wherein said selection is one or more rows in said grid.

12. (Original) The method of claim 1, wherein said selection is one or more columns in said grid.

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13. (Previously Presented) The method of claim 1, wherein said selection is one or more individual cells in said grid, wherein said one or more individual cells do not comprise an entire row or an entire column.

14. (Original) The method of claim 13, wherein preexisting mappings for rows or columns containing said selection are overwritten for said selected individual cells.

15. (Previously Presented) A method for establishing a mapping between internal metadata for a database and external metadata, the method comprising:

reading the internal metadata from the database, the internal metadata including metadata that describes data stored in the database;

generating and displaying a screen, the screen including a grid having rows and columns, the rows and columns having dimensional metadata from the internal metadata placed in the grid as row and/or column headings, the grid further including the internal metadata read from the database;

receiving from a user a selection of a portion of the grid, the selection indicating the internal metadata to be mapped to the external metadata;

in response to receiving the user selection:

determining if the external metadata describing all data points within said selection is predefined, and if so, receiving from said user a definition of external metadata comprising:

presenting said user a list from which they may select an item of predefined metadata; and

receiving from said user a selection of an item of predefined metadata from said list; and

determining if a syntax of the external metadata describing all data points within said selection is predefined and the external metadata for said selection is not predefined, and if so, receiving from said user a definition of external metadata comprising:

presenting said user with one or more dialog boxes in which they can specify external metadata to be created; and

receiving from said user a specification of external metadata to be created;

creating a mapping between the internal metadata of the selected portion of the grid and the external metadata based on the user selections; and

receiving from said user a formula involving one or more data items in said grid;

creating a new row or column in said grid;

entering said formula into a cell in said new row or column; and

wherein said selection includes said cell.

16. (Original) The method of claim 1, wherein said external metadata is Extensible Business Reporting Language (XBRL) metadata.



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17. (Original) The method of claim 1, wherein an external metadata source is specified using a schema manager.

18. (Previously Presented) An apparatus that presents a user interface for establishing a mapping between internal metadata for a database and external metadata, the apparatus comprising a computer configured with:

means for reading the internal metadata from the database, the internal metadata including metadata that describes data stored in the database;

an internal metadata grid organizer configured to generate and display a screen, the screen including a grid having rows and columns, the rows and columns having dimensional metadata from the internal metadata placed in the grid as row and/or column headings, the grid further including the internal metadata read from the database;

a grid portion user selection receiver coupled to the internal metadata grid organizer to receive from a user a selection of a portion of the grid, the selection indicating one or more cells of the grid containing internal metadata to be mapped to external metadata in an external system;

means for determining the internal metadata displayed on the grid that corresponds to the one or more cells, the internal metadata corresponding to the one or more cells forming a subset of the internal metadata displayed on the grid;

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a predefined external metadata selection determiner, wherein said external metadata selection determiner determines if all external metadata of the user selection is predefined, and if so presents a user definition receiver including:

a predefined metadata list presenter; and

a predefined metadata list item receiver coupled to said predefined metadata list presenter; and

an external metadata syntax determiner wherein said external metadata syntax determiner determines if a syntax for all external metadata of the user selection is predefined, and if so, presents a user definition receiver including:

an external metadata dialog box presenter; and

an external metadata specification receiver coupled to said external metadata dialog box presenter; and

a new row or column creator, wherein said new row or column creator determines if the user selection has neither all external metadata of the user selection predefined nor the syntax for all external metadata of the user selection predefined, and if so, creates a new row or column including:

a user formula receiver;

a new row or column creator coupled to said user formula receiver and to said internal metadata grid organizer;

a new row or column user formula placer coupled to said new row or column creator and to said user formula receiver.

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19. (Canceled)

20. (Canceled)

21. (Canceled)

22. (Canceled)

23. (Previously Presented) A non-transitory computer readable medium containing a program thereon which when executed by a computer cause the computer to present a user interface for establishing a mapping between internal metadata for a database and external metadata, the user interface comprising instructions which cause the computer to:

read the internal metadata from the database, the internal metadata including metadata that describes data stored in the database;

generate and display a screen, the screen including a grid having rows and columns, the rows and columns having dimensional metadata from the internal metadata placed in the grid as row and/or column headings, the grid further including the internal metadata read from the database;

receive from a user a selection of a portion of the grid, the selection indicating one or more cells of the grid;

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determine the internal metadata displayed on the grid that corresponds to the one or more cells, the internal metadata corresponding to the one or more cells forming a subset of the internal metadata displayed on the grid;

determine if the external metadata describing all data points within said selection is predefined; wherein if the external metadata describing all data points within said selection is predefined, and if so, receive from said user a definition of external metadata comprising:

means for presenting said user a list from which they may select an item of predefined metadata; and

receiving from said user a selection of an item of predefined metadata from said list; and

determine if syntax of the external metadata describing all data points within said selection is predefined; wherein if the external metadata describing all data points within said selection is not predefined, but syntax of the external metadata describing all data points within said selection is predefined, said and if so, receive from said user a definition of external metadata comprising:

presenting said user with one or more dialog boxes in which they can specify external metadata to be created; and

receiving from said user a specification of external metadata to be created; and

determine if the external metadata describing all data points within said selection is not predefined and syntax of the external metadata describing all data points within

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said selection is not predefined, and if so create a new column or row by performing steps comprising:

receiving from said user a formula involving one or more data items  
in said grid;  
creating a new row or column in said grid;  
entering said formula into a cell in said new row or column; and  
wherein said selection includes said cell.

24. (Canceled)

25. (Canceled)

26. (Previously Presented) The apparatus of claim 23, wherein said list is provided in a tree control.

27. (Canceled)

28. (Currently Amended) The apparatus non-transitory computer readable medium of claim 23, wherein ~~said means for presenting includes means for presenting~~ said user with a dialog box in which they can specify an entity for said external metadata to be created.

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29. (Currently Amended) The ~~apparatus~~ non-transitory computer readable medium of claim 23, wherein ~~said means for presenting includes means for presenting~~ said user with a dialog box in which they can specify units for said external metadata to be created.

30. (Currently Amended) The ~~apparatus~~ non-transitory computer readable medium of claim 23, wherein ~~said means for presenting~~ said user with a dialog box in which they can specify a time period for said external metadata to be created.

31. (Currently Amended) The ~~apparatus~~ non-transitory computer readable medium of claim 23, ~~wherein said means for presenting~~ said user with a dialog box in which they can specify a scenario for said external metadata to be created.

32. (Currently Amended) The ~~apparatus~~ non-transitory computer readable medium of claim 31, wherein a control for said dialog box is a tree control when an element button is selected and a text field when a custom button is selected.

33. (Currently Amended) The ~~apparatus~~ non-transitory computer readable medium of claim 23, wherein said selection is one or more rows in said grid.

33. (Currently Amended) The ~~apparatus~~ non-transitory computer readable medium of claim 23, wherein said selection is one or more columns in said grid.

34. (Currently Amended) The ~~apparatus~~ non-transitory computer readable medium of claim 23, wherein said selection is one or more individual cells in said grid.

35. (Currently Amended) The ~~apparatus~~ non-transitory computer readable medium of claim 35, wherein preexisting mappings for rows or columns containing said selection are overwritten for said selected individual cells.

36. (Canceled)

37. (Currently Amended) The ~~apparatus~~ non-transitory computer readable medium of claim 23, wherein said external metadata is Extensible Business Reporting Language (XBRL) metadata.

38. (Currently Amended) The ~~apparatus~~ non-transitory computer readable medium of claim 23, wherein an external metadata source is specified using a schema manager.

39. (Previously Presented) The method of Claim 1 wherein:  
the internal metadata describes data, contained in the database, from which a report is to be generated; and the screen includes tools for designing the report.

40. (Previously Presented) The apparatus of Claim 18 wherein:

the internal metadata describes data, contained in the database, from which a report is to be generated; and the screen includes tools for designing the report.

41. (Currently Amended) The ~~apparatus~~ non-transitory computer readable medium of Claim 23 wherein: the internal metadata describes data, contained in the database, from which a report is to be generated; and the screen includes tools for designing the report.

### ***Allowable Subject Matter***

❖ Claim(s) 1, 4, 6-18, 23, 26, 28-36 and 38-42 are allowed:

The following is a statement of reasons for the indication of allowable subject matter:

Interpreting the claims in light of the specification, Examiner finds the claimed invention is patentably distinct from the prior art of record, which set forth in the followings:

- **Davis** discloses the mapper for generating a relationship between data from one or more sources and the one or more values to be placed within the report (Davis, Para 27); wherein XBRL text documents may be parsed and translated into RDX documents or NDOMs (Davis, P [0062]). The RDX documents and NDOMs may then, by means of an RDX mapper 210, be translated back into XBRL for reporting purposes



(Davis, FIG. 2, P [0065]). The RDX mapper 210 utilizes document templates 214 for mapping instructions. (*Davis* at P [0064]). These document templates 214 are created manually by a user "in a manner similar to a word processor." (*Davis* at P [0063]).

- **Block** describes a system for adding labels to data elements in a document. (*Block*, Abstract). The system in *Block* in some cases appears as a printer driver, such that all the data from the source is included in the data stream. (*Block*, P [0034]). Each text string in the input is compared with a known text string, and if a match is found, the text string is labeled accordingly. (*Block*, Fig. 1B, P [0039]). For text strings that are not identified, a user is prompted to select a label. (*Block*, P [0040]). That label is used if and when the text string is encountered in the future.

Under the broadest reasonable interpretation of the claimed limitation which is consistence with the Applicant's Specification. The prior art cited above fails to teach all of the Applicant's claimed limitation. In particularly, the claimed invention advantageously provides a finer level of detail that enables the creating of new rows or columns and receiving a formula from a user, if neither the external metadata describing all data points within said selection is predefined nor the syntax of the external metadata describing all data points within said selection is predefined, and if so creating new internal metadata comprising:

***creating a new row or column in the grid;***

***Receiving a formula involving the user selection of a portion of the grid;***

***Entering the formula into a cell in the new row or column;*** and

repeating the steps of determining if the external metadata describing all data points within said selection is predefined and determining if a syntax of the external metadata describing all data points within said selection is predefined; [See independent claims 1, 15, 18, 23; Also see the remarks Page 12, lines 16-25; the Remarks Page 14, lines 20-27 and supported by Applicant's specification @ Page 14 Para 26 and @ Page 15 Para 27, see also Fig. 14]

The Examiner asserts that the claims overcome the prior art of record as describes above when the limitations are read in combination with the respective claimed limitations in their entirety.

Any comments considered necessary by applicant must be submitted no later than the payment of the issue fee and, to avoid processing delays, should preferably accompany the issue fee. Such submissions should be clearly labeled "Comments on Statement of Reasons for Allowance."

***Conclusion***

Any inquiry concerning this communication or earlier communications from the examiner should be directed to Quoc A. Tran whose telephone number is 571-272-8664. The examiner can normally be reached on Mon through Fri 8AM - 5PM.

If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Doug Hutton can be reached on (571)272-4137. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see <http://pair-direct.uspto.gov>. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free).

/Quoc A. Tran/  
Examiner, Art Unit 2176

/DOUG HUTTON/  
Supervisory Patent Examiner, Art Unit 2176